



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public.

Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC		A Employer identification number 75-2734032	
Number and street (or P O box number if mail is not delivered to street address) 325 N ST PAUL STREET		B Telephone number (see instructions) (214) 220-2128	
City or town, state or province, country, and ZIP or foreign postal code DALLAS, TX 75201		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☒ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 64,484,795		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	33,500			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	662,728	662,728		
	4 Dividends and interest from securities.	838,125	838,125		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,381,374			
	b Gross sales price for all assets on line 6a 10,133,788				
	7 Capital gain net income (from Part IV, line 2) . . .		1,381,374		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	1,533,632	1,116,256		
	12 Total. Add lines 1 through 11	4,449,359	3,998,483		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	342,129	171,353		170,776
	14 Other employee salaries and wages	61,265	30,633		30,633
	15 Pension plans, employee benefits	80,697	47,517		33,180
	16a Legal fees (attach schedule)	4,301	4,301		
	b Accounting fees (attach schedule)	28,412	14,206		14,206
	c Other professional fees (attach schedule)	442	442		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	53,313	12,777		5,480
	19 Depreciation (attach schedule) and depletion	172,017	172,017		
	20 Occupancy	51,606	27,839		23,767
	21 Travel, conferences, and meetings	112,103	13,160		98,943
	22 Printing and publications	4,976	1,815		3,161
	23 Other expenses (attach schedule)	671,961	354,700		47,897
	24 Total operating and administrative expenses. Add lines 13 through 23	1,583,222	850,760		428,043
	25 Contributions, gifts, grants paid	2,389,938			2,389,938
	26 Total expenses and disbursements. Add lines 24 and 25	3,973,160	850,760		2,817,981
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	476,199			
	b Net investment income (if negative, enter -0-)		3,147,723		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	349,944	891,320	891,320
	2	Savings and temporary cash investments	3,775,244	2,554,978	2,554,978
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____	579,001		
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	85,222		
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	23,235,865	25,897,431	25,897,431
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ 279,402 Less accumulated depreciation (attach schedule) ▶ _____	279,402	279,402	279,402
	12	Investments—mortgage loans	3,017,827	5,380,556	5,380,556
	13	Investments—other (attach schedule)	27,330,133	29,439,565	29,439,565
	14	Land, buildings, and equipment basis ▶ 120,235 Less accumulated depreciation (attach schedule) ▶ 78,692	36,201	41,543	41,543
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	58,688,839	64,484,795	64,484,795
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue	78,102		
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)		31,948	
	23	Total liabilities (add lines 17 through 22)	78,102	31,948	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	58,610,737	64,452,847	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	58,610,737	64,452,847	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	58,688,839	64,484,795	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	58,610,737
2	Enter amount from Part I, line 27a	2	476,199
3	Other increases not included in line 2 (itemize) ▶ _____	3	5,365,911
4	Add lines 1, 2, and 3	4	64,452,847
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	64,452,847

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	1,381,374
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }			3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	2,912,987	61,461,439	0 04740
2012	2,881,245	58,725,473	0 04906
2011	2,633,733	58,207,876	0 04525
2010	2,695,607	55,513,929	0 04856
2009	2,904,015	53,341,933	0 05444
2 Total of line 1, column (d).			2 0 24470
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 04894
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.			4 63,287,615
5 Multiply line 4 by line 3.			5 3,097,359
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 31,477
7 Add lines 5 and 6.			7 3,128,836
8 Enter qualifying distributions from Part XII, line 4.			8 2,817,981
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			

Part VI

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	62,954
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	
3		Add lines 1 and 2.		3	62,954
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	62,954
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	80,000	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	80,000
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	17,046
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 17,046 Refunded ☐		11	

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ (2) On foundation managers ☐ \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ TX			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV.</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶ WWW HATTONSUMNERS ORG				
14	The books are in care of ▶ HUGH C AKIN Telephone no ▶ (214) 220-2128			
Located at ▶ 325 NORTH ST PAUL SUITE 3920 DALLAS TX ZIP +4 ▶ 752013821				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐			
and enter the amount of tax-exempt interest received or accrued during the year ▶		15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No				
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No				
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No				
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No				
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No				
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No				
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		No
Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No			
If "Yes," list the years ▶ 20____, 20____, 20____, 20____				
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☒ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

No

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

 Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

 Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

 Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

No

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WENDY WERNER 325 N ST PAUL STREET STE 3920 DALLAS, TX 75201	EXEC ASSISTANT 40 00	61,265	9,190	

Total

number of other employees paid over \$50,000.

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ACCOUNTEMPS	CONTRACT EMPLOYEE	58,638
PO BOX 743295		
LOS ANGELES,CA 900743295		
Total number of others receiving over \$ 50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	29,895,301
b	Average of monthly cash balances.	1b	3,851,029
c	Fair market value of all other assets (see instructions).	1c	30,505,056
d	Total (add lines 1a, b, and c).	1d	64,251,386
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	64,251,386
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	963,771
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	63,287,615
6	Minimum investment return. Enter 5% of line 5.	6	3,164,381

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	3,164,381
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	62,954
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	40,585
c	Add lines 2a and 2b.	2c	103,539
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	3,060,842
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	3,060,842
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	3,060,842

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	2,817,981
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,817,981
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,817,981
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				3,060,842
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			2,437,536	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 2,817,981				
a Applied to 2013, but not more than line 2a			2,437,536	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				380,445
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				2,680,397
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions) . . .				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2010. . . .				
b Excess from 2011. . . .				
c Excess from 2012. . . .				
d Excess from 2013. . . .				
e Excess from 2014. . . .				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

HUGH C AKIN
325 N ST PAUL STREET SUITE 3920
DALLAS, TX 752013821
(214) 220-2128

b

The form in which applications should be submitted and information and materials they should include

LETTER, RESUME OF ORGANIZATION OR PERSON AND OTHER SUPPORTING MATERIAL

c

Any submission deadlines

VARIOUS

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

AWARDS ARE LIMITED TO THE STUDY AND TEACHING OF THE SCIENCE OF SELF-GOVERNMENT

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data TableSee Additional Data Table				
Total			3a	2,389,938
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2014)

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash.

(2) Other assets.

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization.

(3) Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees. . . .

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . ☐ Yes ☒ No

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

***** 2016-08-17 *****

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below
(see instr)? ☒ Yes ☐ No

Print/Type preparer's name Kimberly D Crawford	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00446484
Firm's name ☒ Sutton Frost Cary LLP			Firm's EIN ☒	
Firm's address ☒ 600 Six Flags Dr Suite 600 Arlington, TX 76011			Phone no (817) 649-8083	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID G DRUMM	Chairman 2 00	30,000		
901 MAIN STREET STE 500 DALLAS,TX 752023767				
CHARLES L MOORE	VICE CHAIRMAN 2 00	28,500		
5901-J WYOMING BLVD NE 154 ALBUQUERQUE,NM 87109				
JERRY D REIS	Treasurer 2 00	27,000		
6012 W CAMPUS CIRCLE DR 210 IRVING,TX 75063				
LON R WILLIAMS	Secretary 2 00	25,000		
2501 N HARWOOD SUITE 1900 DALLAS,TX 75201				
W DALE CRANE	Director 2 00	25,000		
PO BOX 92817 SOUTHLAKE,TX 76092				
SCOTT M HIGGINBOTHAM	Director 2 00	25,000		
125 BELLAIRE AVENUE DUMAS,TX 79029				
WILLIAM W MEADOWS	Director 2 00	18,744		
421 W 3RD STREET SUITE 800 FORT WORTH,TX 76102				
HUGH C AKIN	Executive Dir 40 00	160,000	24,000	
325 N ST PAUL ST STE 3920 DALLAS,TX 75201				
MIKE MCELROY	Controller 40 00	2,885	433	
325 N ST PAUL ST STE 3920 DALLAS,TX 75201				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ARC OF DALLAS 12700 HILLCREST PLAZE DR DALLAS,TX 75230	NONE	PC	iLead	25,000
BAYLOR UNIVERSITY 1311 S 5TH ST WACO,TX 76706	NONE	PC	iTeach iCivics	45,000
BIG BROTHERS BIG SISTERS LONESTAR 450 E JOHN CARPENTER FWY IRVING,TX 75062	NONE	PC	CITIZENSHIP CHARACTER PROGRAM	9,000
THE BILL OF RIGHTS INSTITUTE 200 NORTH GLEBE ROAD ARLINGTON,VA 22203	NONE	PC	CONSTITUTION SEMINAR N M & OK TEACHERS	20,000
ESPANOLA PUBLIC SCHOOLS 714 CALLE DON DIEGO ESPANOLA,NM 87532	NONE	PC	T V PRODUCTION/PUBLIC/COMMUNITY AFFAIRS	11,000
FOUNDATION FOR TEACHING ECONOMICS 260 RUSSELL BLVD DAVIS,CA 95616	NONE	PC	ECONOMICS EDUCATION PROGRAM	75,000
FUND FOR AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE WASHINGTON,DC 20009	NONE	PC	2014 SUPPLEMENTAL GRANT-PAUL CRAWFORD	2,438
GARLAND ISDBEST FOUNDATION 501 S JUPITER GARLAND,TX 75042	NONE	PC	YMCA YOUTH AND GOVERNMENT	15,000
GLASSHOUSE POLICY 1408 E 13TH STREET AUSTIN,TX 78702	NONE	PC	Online Public Policy Development	30,000
HOWARD PAYNE UNIVERSITY 1000 FISK STREET BROWNWOOD,TX 76801	NONE	PC	Scholarship Program Development	10,000
HUSTON-TILLOTSON COLLEGE 900 CHICON STREET AUSTIN,TX 78702	NONE	PC	SUMNERS SCHOLARSHIPS	72,000
IGNITE TEXAS PO BOX 300182 AUSTIN,TX 78703	NONE	PC	CIVIC/POLITICAL ENGAGEMENT BY YOUNG WOMEN	20,000
INSTITUTE FOR POLICY INNOVATION 1660 S INTERSTATE 35-E LEWISVILLE,TX 75067	NONE	PC	HWS CITIZENSHIP SERIES LUNCHEON	25,000
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS,TX 75254	NONE	PC	"BEING AN AMERICAN" CURRICULUM	35,000
NEW MEXICO FIRST 505 MARQUETTE AVE ALBUQUERQUE,NM 87102	NONE	PC	IMPLEMENT PUBLIC EDUCATION AFTER TOWN HALL MEETING	100,000
Total  3a				2,389,938

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NEW MEXICO STATE UNIVERSITY FOUNDATION 1780 E UNIVERSITY AVE LAS CRUCES,NM 88003	NONE	PC	DOMENICI PUBLIC POLICY CONFERENCE	10,000
OCU SCHOOL OF LAW 800 N HARVEY AVE OKLAHOMA CITY,OK 73102	NONE	PC	HIGH IDEALS SCHOLARSHIP PREVIEW	5,000
OKLAHOMA BAR ASSOCIATION-LAW RELATORS 1901 N LINCOLN BLVD OKLAHOMA CITY,OK 73152	NONE	PC	SUMMER TEACHERS INSTITUTE & ATTY'S IN CLASS	45,000
PHILANTHROPY ROUNDTABLE 1730 M STREET NM WASHINGTON,DC 20036	NONE	PC	GENERAL SUPPORT AND ALLIANCE FOR CHARITABLE REFORM	10,000
PROJECT VOTE SMART ONE COMMON GROUND PHILIPSBURG,MT 59858	NONE	PC	"POLITICAL GALAXY"	20,000
SCHREINER UNIVERSITY 2100 SAN ANTONIO HWY KERRVILLE,TX 78028	NONE	PC	WHITEHURST AWARDS	4,500
SMU UNDERGRADUATE SCHOOL PO BOX 750100 DALLAS,TX 75275	NONE	PC	JOHN G TOWER SUPPLEMENT TO ENDOWMENT	20,000
SOUTHWESTERN UNIVERSITY 1001 E UNIVERSITY AVE GEORGETOWN,TX 78626	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	80,000
ST EDWARDS UNIVERSITY 3001 S CONGRESS AVE AUSTIN,TX 78704	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	80,000
TEXAS CHRISTIAN UNIVERSITY 2800 S UNIVERSITY DR FORT WORTH,TX 76129	NONE	PC	DISTINGUISHED SCHOLARS (FORMERLY PARTIAL TUITION)	70,000
TEXAS TRIBUNE 823 CONGRESS AVE AUSTIN,TX 78701	NONE	PC	YOUTH PARTICIPATION	75,000
TEXAS WESLEYAN UNIVERSITY 1201 WESLEYAN ST FORT WORTH,TX 75105	NONE	PC	SCHOLARSHIP PROGRAM DEVELOPMENT	6,400
UNIVERSITY OF DALLAS 1845 E NORTHGATE DR IRVING,TX 75062	NONE	PC	SUMNERS SCHOLARSHIP PROGRAM	100,000
UNIVERSITY OF NORTH TEXAS FOUNDATION 1155 UNION CIRCLE DENTON,TX 76203	NONE	PC	PUBLIC ADM FELLOWSHIPS/LIVING ALLOWANCE	130,500
UNIVERSITY OF TEXAS AT AUSTIN BOX 8058 AUSTIN,TX 78712	NONE	PC	ANNETTE STRAUS INSTITUTE- (VARIOUS FORMER GRANTS)	150,000
Total  3a				2,389,938

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF SOUTHWEST 6610 N LOVINGTON HWY HOBBS,NM 88242	NONE	PC	HWS RESPONSIBLE CITIZENSHIP SERIES	18,000
WOODROW WILSON HS COMMUNITY FOUNDATION 100 S GLASSGOW DALLAS,TX 75214	NONE	PC	TEXAS LEADERSHIP PROGRAM	10,000
YMCA ALBUQUERQUE CENTRAL NM 4701 MONTANO RD NM ALBUQUERQUE,NM 87120	NONE	PC	YOUTH AND GOVERNMENT	75,000
YMCA ARLINGTON 2200 S DAVIS DR ARLINGTON,TX 76011	NONE	PC	YOUTH AND GOVERNMENT	12,500
YMCA OF AUSTIN TEXAS STATE ALLIANCE 3208 RED RIVER ST AUSTIN,TX 78705	NONE	PC	YOUTH AND GOVERNMENT	155,000
YMCA OKLAHOMA CITY 100 W MAIN ST OKLAHOMA CITY,OK 73102	NONE	PC	YOUTH AND GOVERNMENT	75,000
AUSTIN COLLEGE 900 N GRAND AVE SHERMAN,TX 75090		PC	PRE-LAW SOCIETY'S ANNUAL SYMPOSIUM	750
PRESTON HOLLOW PRESBYTERIAN CHURCH 9800 PRESTON FD DALLAS,TX 75230	NONE	PC	MEMORIAL GIFT IN HONOR OF GORDON CARPENTER	100
AUSTIN COLLEGE 900 N GRAND AVE SHERMAN,TX 75090	NONE	PC	PUBLIC ADMINISTRATION SUPOSIUM	750
BIG BROTHERS & BIG SISTERS LONE STAR 450 E JOHN CARPENTER FWY IRVING,TX 75062	NONE	PC	PROMISE SCHOLARSHIP PROGRAM	7,000
BIG BROTHERS & BIG SISTERS LONE STAR 450 E JOHN CARPENTER FWY IRVING,TX 75062	NONE	PC	CIVIC MENTORING PROGRAM	60,000
THE BILL OF RIGHTS INSTITUTE 200 NORTH GLEBE ROAD ARLINGTON,VA 22203	NONE	PC	"TEXAS CITIZEN BEE" PROGRAM MAINTANANCE	2,000
FUND FOR AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE WASHINGTON,DC 20009	NONE	PC	UNDERGRAD SCHOLARSHIPS TO WASHINGTON DC	45,000
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS,TX 75254	NONE	PC	TEACHER TRAINING INSTITUTE ON THE FOUNDING DOCUMENTS	300,000
LAW FOCUSED EDUCSTATE BAR OF TEXAS 14651 DALLAS PKWY DALLAS,TX 75254		PC	TEXAS CITIZEN BEE COMPETITION	40,000
Total  3a				2,389,938

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NEW MEXICO FIRST 505 MARQUETTE AVE ALBUQUERQUE,NM 87102	NONE	PC	NEW MEXICO PROGRESS REPORT	25,000
SCHREINER UNIVERSITY 2100 SAN ANTONIO HWY KERRVILLE,TX 78028	NONE	PC	SCHOLARSHIP PROGRAM DEVELOPMENT	8,000
UNIVERSITY OF TEXAS AT AUSTIN BOX 8058 AUSTIN,TX 78712	NONE	PC	LBJ SCHOOL LEADERSHIP CONFERENCE 2006-2014	180,000
UNIVERSITY OF TEXAS AT AUSTIN BOX 8058 AUSTIN,TX 78712	NONE	PC	SUMNERS DISTINGUISHED LECTURE	75,000
Total			3a	2,389,938

TY 2014 Accounting Fees Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	28,412	14,206	0	14,206

TY 2014 Investments Corporate
Stock Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VANGUARD INSTITUTIONAL INDEX	20,443,267	20,443,267
BLAIR EMERGING MARKET FUND	2,981,920	2,981,920
BS THAI BAHT	6,512	6,512
ADIDAS	27,312	27,312
ACCOR	39,482	39,482
AMDOCS LIMITED	40,123	40,123
AMERICA MOVIL	42,807	42,807
ADMIRAL GROUP PLC	44,427	44,427
ALUMINA LIMITED	13,746	13,746
ACCOR	25,536	25,536
ANHEUSER BUSH	35,363	35,363
ANHEUSER BUSH	16,003	16,003
AGGREKO PLC	9,260	9,260
AGGREKO PLC	17,784	17,784
ADMIRAL GROUP PLC	25,899	25,899
ALUMINA	8,438	8,438
ADIDAS	27,780	27,780
AMBEV S A	46,650	46,650
BEIERSDORF	19,666	19,666
BIOMERIEUX 69 MARCY	9,379	9,379
BEIERSDORF AG AKT	13,864	13,864
BRENNTAG AG	30,682	30,682
BIOMERIEUX	5,210	5,210
BRENNTAG AG MUEHLEIM RUHR	23,595	23,595
CARREFOUR	27,674	27,674
CRH PLC-ORD	20,659	20,659
CARREFOUR SA	31,365	31,365
CARLSBERG AS ORD CL B	11,689	11,689
CRH PLC ORD	14,335	14,335
CGG	6,730	6,730

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CHAROEN POKPHAND FOODS PCL	4,720	4,720
CAMECO CORP	60,429	60,429
CARLSBERG-SER B	15,628	15,628
SOCIEDAD QUIMICA MINERA	15,044	15,044
DIAGEO PLC-ORD	45,153	45,153
DANONE	43,677	43,677
DANONE	20,582	20,582
DIAGEO PLC	12,528	12,528
ENCANA CORP	53,384	53,384
FRESENIUS MEDICAL CARE	41,745	41,745
FRESENIUS MEDICAL CARE AG	21,004	21,004
IMPERIAL TOBACCO GROUP	24,268	24,268
HSBC HOLDINGS	11,881	11,881
ILUKA RESOURCES	7,059	7,059
HOLCIM LTD	17,306	17,306
ITV PLC	31,439	31,439
HSBC HOLDINGS	32,478	32,478
IMPERIAL TOBACCO GROUP	8,817	8,817
ILUKA RESOURCES LIMITED	3,792	3,792
HOLCIM LTD	15,863	15,863
KINGFISHER PLC	47,228	47,228
KONINKLIJKE VOPAK ROTTERDAM	4,212	4,212
KONINKLIJKE VOPAK ROTTERDAM	12,044	12,044
KINGFISHER PLC	20,924	20,924
LIFE HEALTHCARE GR	37,724	37,724
LATAM AIRLINES GROUP	17,060	17,060
LIBERTY GLOBAL	39,160	39,160
LULULEMON ATHLETICA INC	42,958	42,958
MODERN TIMES GROUP	15,092	15,092
NOVO NORDISK AS	31,861	31,861

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NOVONORDISK	10,450	10,450
NEXANS PARIS ACT	9,572	9,572
NESTLE SA	13,219	13,219
NORSK HYDRO ASA	10,461	10,461
NESTLE SA	20,643	20,643
NEXANS PARIS	11,507	11,507
NORSK HYDRO ASA	18,298	18,298
PETROLEO BRASILEIRO	13,644	13,644
PETROLEUM GEO SVS	5,931	5,931
QIAGEN NV	21,029	21,029
PETROLEUM GEO SERVICES ASA	9,315	9,315
OCADO GROUP PLC	13,754	13,754
OCADO GROUP	8,988	8,988
OTSUKA HOLDINGS CO	22,991	22,991
QIHOO 360 TECHNOLOGY CO LTD	37,792	37,792
PROSIEBENSAT1 MEDI	10,628	10,628
PROSIEBENSAT1 MEDIA AG	6,314	6,314
POTASH CORP OF SASKATCHEWAN	34,048	34,048
RYANAIR HOLDINGS	42,762	42,762
ROCHE HOLDINGS	27,277	27,277
REMY COINTREAU	5,383	5,383
REMY COINTREAU	9,420	9,420
SWEDISH MATCH CO	11,058	11,058
SCHNEIDER ELECTRIC	14,364	14,364
SANOFI	37,426	37,426
SYNGENTA AG	18,111	18,111
SABMILLER	36,604	36,604
SHANDONGWEIGAO GROUP	22,594	22,594
SANOFI	17,430	17,430
SKF AB	37,522	37,522

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SHANDONGWEIGAO GP MED	6,459	6,459
SYNGENTA AG BASEL NAMEN AKT	14,047	14,047
SABMILLER	9,315	9,315
SGS LTD	20,637	20,637
SGS SA	20,668	20,668
SVENSKA KULLAGERFABRIKEN AB	17,699	17,699
SWEDISH MATCH CO	5,024	5,024
SCHNEIDER ELECTRIC SE	7,937	7,937
SKY PLC	51,892	51,892
SKY PLC	34,638	34,638
SCHLUMBERGER LTD	65,766	65,766
THYSSENKRUPP AG	14,728	14,728
TV FRANCAISE 1 SA	10,281	10,281
TENCENT HOLDINGS	10,150	10,150
TENCENT HOLDINGS	40,605	40,605
TESCO	40,874	40,874
THYSSENKRUPP	8,208	8,208
TELEVISION FRANCAISE T F 1	7,015	7,015
TRICAN WELL SERVICE	8,018	8,018
TECK RESOURCES LIMITED	32,736	32,736
TESCO PLC ORD 5P	16,790	16,790
UMICORE NPV	14,431	14,431
UNILEVER PLC	31,979	31,979
UMICORE NPV	14,572	14,572
WHITEHAVEN COAL LTD	9,920	9,920
WHITEHAVEN COAL LTD	2,290	2,290

TY 2014 Investments - Land Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	279,402		279,402	279,402

TY 2014 Investments - Other Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DIAMONDHILL - JPM	FMV	5,338,811	5,338,811
AMERRA AGRI FUND II LP	FMV	1,749,970	1,749,970
WHITEBOX MULTI STRATEGY FUND	FMV	3,044,180	3,044,180
PEAK 6 PERFORMANCE	FMV	21,570	21,570
K-18 ML WELSH CARSON	FMV	544,868	544,868
ML-K-18-WP TRUST IV	FMV	372,029	372,029
KAYNE ANDERSON RE PTNR	FMV	1,202,785	1,202,785
LINX FUND I LP	FMV	2,028,958	2,028,958
LINX PLUS FUND, LP	FMV	2,028,813	2,028,813
CAPITAL ROY PARTNERS II	FMV	1,156,777	1,156,777
TIDELAND ROYALTY TRUST "B"	FMV	33,737	33,737
ORRI GULF OF MEXICO	FMV	1,429,182	1,429,182
ORRI OFFSHORE #2	FMV	917,196	917,196
ORRI OKLAHOMA #1	FMV	517,648	517,648
ORRI OKLAHOMA #2	FMV	504,100	504,100
ORRI KANSAS	FMV	198,739	198,739
ORRI LOUISIANA	FMV	5,504	5,504
ORRI TEXAS	FMV	20,760	20,760
ORRI OKLAHOMA #3	FMV	107,430	107,430
ORRI NEW MEXICO #1	FMV	132,531	132,531
ORRI TEXAS #2	FMV	71,394	71,394
ORRI TEXAS #3	FMV	123,811	123,811
ORRI TEXAS #4	FMV	170,635	170,635
ORRI LOUISIANA #2	FMV	605	605
ORRI LOUISIANA # 3	FMV	57,973	57,973
ORRI TEXAS #5	FMV	72,784	72,784
ORRI NEW MEXICO #2	FMV	10,086	10,086
ORRI TEXAS # 6	FMV	43,446	43,446
ORRI LOUISIANA #5	FMV	246,504	246,504
ORRI KANSAS #2	FMV	366,760	366,760

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ORRI WYOMING #1	FMV	430,780	430,780
MADISON 1600 VICEROY	FMV	183,426	183,426
BACELINE NO DEBT RE FD	FMV	800,000	800,000
BACELINE NOP DEBT III	FMV	870,000	870,000
BRIARGROVE PLACE OFFICE BUILDING	FMV	1,759,287	1,759,287
TALON 2525 MCKINNON	FMV	1,480,178	1,480,178
HERITAGE OFFICE BUILDING (PAR CAPITAL)	FMV	1,396,308	1,396,308

TY 2014 Land, Etc. Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Machinery and Equipment	120,235	78,692	41,543	41,543

TY 2014 Legal Fees Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	4,301	4,301	0	0

TY 2014 Other Expenses Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONTRACT LABOR	58,638	29,319		29,319
INSURANCE	74,056	74,056		
INVESTMENT EXPENSES	173,488	173,488		
MISCELLANEOUS	44,490	44,490		
MISCELLANEOUS ADMIN EXPENSES	1,465	770		695
NEWSLETTER PROGRAM	6,138			6,138
OIL & GAS ROYALTY EXPENSE	20,913	20,913		
PARKING	5,586	2,988		2,598
Rental Expenses	269,364			
SUPPLIES	4,000	2,077		1,923
TELEPHONE	13,823	6,599		7,224

TY 2014 Other Income Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
LITIGATION SETTLEMENT	10,958	10,958	
OIL & GAS ROYALTIES	1,105,298	1,105,298	
Rental Income - Noninvestment Property	417,376		

TY 2014 Other Liabilities Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Description	Beginning of Year - Book Value	End of Year - Book Value
FEDERAL INCOME TAX PAYABLE		31,948

TY 2014 Other Professional Fees Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GRAHAM SERVICE FEES	442	442	0	0

TY 2014 Taxes Schedule

Name: HATTON W SUMNERS FOUNDATION FOR THE
STUDY & TEACHING OF SELF-GOVERNMENT INC

EIN: 75-2734032

Software ID: 14000265

Software Version: 2014v6.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	35,056			
PAYROLL TAX	10,959	5,479		5,480
PROPERTY TAX	7,298	7,298		

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2014

Name of the organization	Employer identification number
HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	75-2734032

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Employer identification number
75-2734032

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	PHILLIP J PFEIFFER 300 CONVENT STREET 2100 SAN ANTONIO, TX 78205	\$ 20,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	Employer identification number 75-2734032
---	---

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

Name of organization HATTON W SUMNERS FOUNDATION FOR THE STUDY & TEACHING OF SELF-GOVERNMENT INC	Employer identification number 75-2734032
---	---

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	